

The AllPro for Employment Networks Database Application

- Ticket-Holder Tracking
- IWP, EN Supplemental, Payment Forms and Related Reports
- Detailed Service Record Journals by Ticket-Holder
- Task Tracking
- Email Communications Directly From the Database
- APOR and Industry Statistics Reporting On Demand For Any Time Period

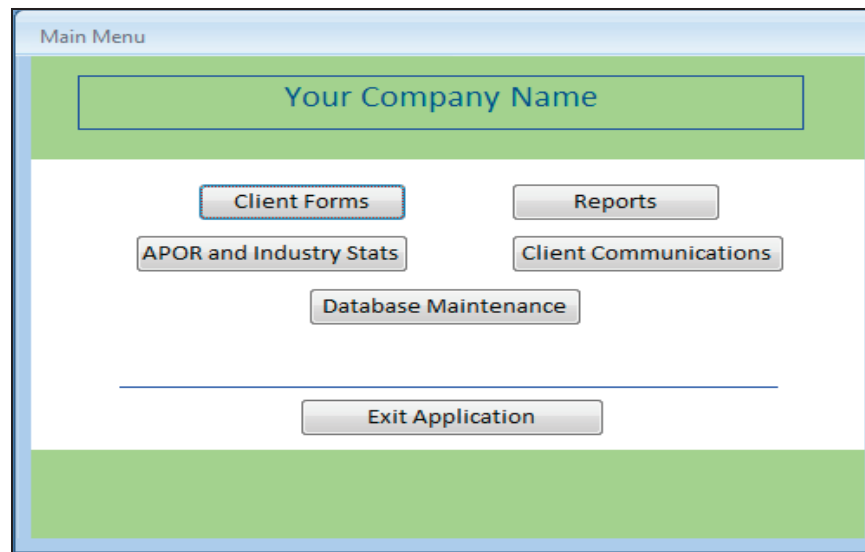
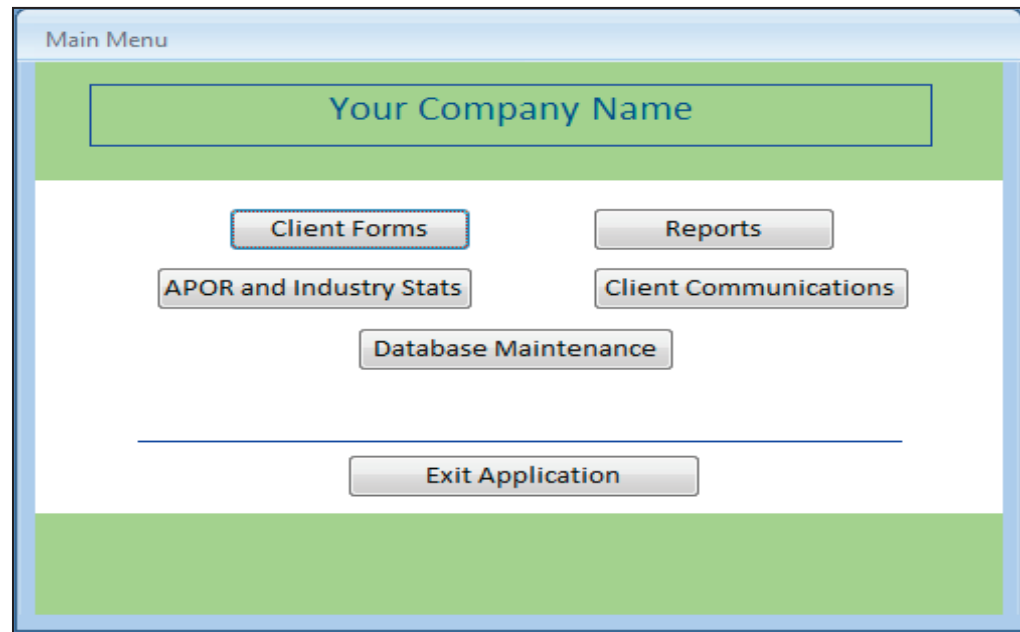


Table of Contents

The AllPro Main Menu	Slide 3
Using Client Forms, Navigation and Service Logs	Slides 4 – 7
Using Tabs Within Client Forms	Slides 8 - 24
AllPro Reports	Slides 25 - 30
APOR and Industry Sector Statistics	Slide 31
Client Communications and Batch Email	Slide 32 - 33
Database Maintenance	Slides 34 - 40
Possible AllPro Deployment Configurations	Slides 41 - 45
About A-Tek Services LLC and AllPro Development	Slide 46

The AllPro Main Menu

- A Switchboard for All Tasks
- Easy to Understand Design
- From Here the User Can:
 - Set-Up the Application For First Use
 - Access Forms to Load Client Data
 - Print Key Reports
 - Check Vital Statistics On Demand
 - Send and Log Batch Emails



Five Main Features:

1. Top or "Persistent" Layer

2. Form Tabs

3. Data Input Section(s)

4. Journal Log

5. Follow-Up / To Do Tasks

Main Menu: Client Forms

The screenshot shows the 'Client Forms Main Page' interface. Red arrows point from the five main features listed on the left to specific sections of the interface:

- 1. Top or "Persistent" Layer:** Points to the top section containing fields for Ticket No., Consultant, SSI / SSDI, First Contacted, Ticket Assigned, Benef. Status, Min. Dur., and a Find Client button.
- 2. Form Tabs:** Points to the tabbed interface with tabs for Personal, Pre-Assignment, Education, Employment, Payment Detail, EN Supp Form, Journal Report, Follow Up, and Client Ops.
- 3. Data Input Section(s):** Points to the main data entry area with fields for Short Name, Spouse Name, Date of Birth, Sex, Address, City, State, Zip Code, County, Phone 1, Phone 2, Best Call Time, Veteran 5 / 10 Point Status, Legal Rep, Date Disabled, Date IWP Sent, Referred By, Other, Comments, and Employment Goal for IWP.
- 4. Journal Log:** Points to the 'Journal Log' tab, which includes fields for Journal Date, Standard Tasks, Required Tasks, Freeform Entry, and a Print Report button.
- 5. Follow-Up / To Do Tasks:** Points to the 'FollowUp To Do' tab, which includes fields for Type, Date FTD Logged, FTD Target Date, CPT?, Date CPT, Entry Description, and a Print Report button.

- 95% of all work will be done within Client Forms
- Journal, Tasks and Forms areas "linked" at all times
- Nine separate tabs provide different functionality

Using “Find Client” and Navigation Buttons

- The “Find Client” and Nav Buttons can be found at the top of the Client Forms area.
- By clicking the button, the user can scroll and find the ticket-holder needed.

The screenshot shows the 'Client Forms Main Page' with a 'Find Client' dropdown menu open. The menu lists several clients with their ticket numbers and names. The client 'Johnson, Elizabeth F.' with ticket number '888888888' is highlighted. The main form area contains fields for Client Info, Personal, Pre-Assignment, Education, Employment, Payment Detail, EN Supp Form, and Journal R.

Ticket No.	Client Name
222552222	Bellamy, Timothy S.
111111114	Brannon, Jill C.
111111115	Brooks, Mitchell K.
222222222	Chambers, Larry M.
555555555	Cowans, Martin L.
663336633	Hankins, Kenneth J.
888888888	Johnson, Elizabeth F.
991119991	Kinsey, Melissa S.
111111111	Masters, Mary P.
444334444	McFadden, Jamie Lynn

- On most all AllPro forms and input screens, navigation buttons can be found at the top right. Use the arrows to move at will among ticket-holders stored in the database.
- Such arrows can be used to move among journal entries on the journal form or payment requests on that form.
- The user can also use the “Advanced Search” button to locate a particular piece of information in the Client file.
- “New” opens a blank form for a new record; “Save” is used to save your edits and work; “Close” closes the form and returns the user to the main menu.

This close-up shows the navigation buttons: 'Find Client' (with a dropdown arrow), 'Advanced Search', 'Refresh', 'New', 'Save', and 'Close'.

- The “Refresh” button is useful to save work and refresh all forms.
- This is especially useful after an auto-log is placed in the journal to ensure proper viewing.

Journal Log and Follow-Up / To-Do

The screenshot displays two side-by-side panels within the A-TEK AllPro for Employment Networks interface. The left panel is titled 'Journal Log' and the right panel is titled 'FollowUp To Do'. Both panels have a 'Ticket No.' field and a 'Save / New' button. The 'Journal Log' panel includes fields for 'Journal Date:', 'Standard Tasks:' (with a pull-down arrow), 'Required Tasks:' (with a pull-down arrow and a checked checkbox), and a 'Freeform Entry:' text area. It also has a 'Print Report' button. The 'FollowUp To Do' panel includes fields for 'Type:' (with a pull-down arrow), 'Date FTD Logged:', 'FTD Target Date:', 'CPT?' (with a checked checkbox), and 'Date CPT:'. It also has a 'Print Report' button. At the bottom of each panel, there is a record navigation bar showing 'Record: 1 of 1' and a 'Search' button. The bottom of the entire interface shows a global record navigation bar with 'Record: 19 of 19' and 'Unfiltered' status.

Journal Features:

- Stores all journals for on-demand access
- Stores unlimited number of journals
- “Pull-down” arrows available for over 40 standard and required tasks
- Freeform entry box available to enter any journal log needed
- “Print” button available to print ticket-holder service log on demand

Follow-Up / To-Do Features:

- Stores all tasks for on-demand access
- Stores unlimited number of tasks
- “Pull-down” box available to select type
- Target date and freeform entry boxes available to describe the planned task
- “Print” button available for reporting
- By clicking “Cpt?”, the completed task is automatically sent to the Journal Log

Example: Journal Log

- A Service Record Report is available on-demand at all times
- The information within the Service Record Report is stored permanently within the AllPro application
- Service Record Reports can be used to provide validation of services needed for payment requests or as an audit if needed

Example: Service Record Report

Nine Form Tabs

1. Personal
 - Name, address, contact info
2. Pre-Assignment
 - IWP Prep and Pre-Assign info
3. Education
4. Employment
 - Employer, benefits info
5. Payment Detail
 - Payment Requests and Tracking
6. EN Supp Form
 - EN Supplemental Form prep
7. Journal Report
8. Follow Up
9. Client Ops
 - Client reports, email, letters

The screenshot displays the 'Client Forms Main Page' with the 'Personal' tab selected. The form includes various input fields for client information, such as 'Ticket No.', 'First Contacted', 'Min. Dur.', 'Benef. Status', 'First Name', 'Middle Name', 'Last Name', 'Short Name', 'Spouse Name', 'Date of Birth', 'Sex', 'Address', 'City', 'State', 'Zip Code', 'County', 'Phone 1', 'Phone 2', 'Best Call Time', 'Veteran 5 / 10 Point Status?', 'Legal Rep', 'Date Disabled', 'Date IWP Sent', 'Referred By', 'Other Comments', and 'Employment Goal for IWP'. The 'Personal' tab is highlighted with a red box, and a red arrow points to it from the title 'Nine Form Tabs'.

- Above view shows the “Personal” tab
- Ticket-holder contact and alternate contact info
- Email ticket-holder, enter employment goal

Tab 1: Personal

1. Contact information, phone numbers, email address for ticket-holder.
2. User can include legal representative name if any.
3. Fields are included for both "Other Comments" and "Employment Goal". Employment Goal is needed for the IWP form.
4. Note that an email can be sent directly from this form using Outlook.

The screenshot displays the 'Client Forms Main Page' for ticket 888-88-8888. The 'Personal' tab is active, showing the following information:

- Client Info:** Ticket No.: 888-88-8888, First Contacted: 07/12/11, Min. Dur.: 45, Consultant: 1, Ticket Assigned: 08/24/11, Benef. Status: Client-Level 2, First Name: Elizabeth, Middle Name: F., Last Name: Johnson.
- Personal:** Short Name: Liz, Spouse Name: David, Email Client: liz@aol.com, Date of Birth: 03/16/50, Sex: F, Address: 45 Biscayne, City: Miami, State: FL, Address 2: Box 1184, Zip Code: 08445-, County: , Phone 1: Client's Cell (777) 888-8888, Phone 2: (555) 444-4444, Best Call Time: After 10:00 p.m. M-F.
- Other Information:** Veteran 5 / 10 Point Status? (unchecked), Legal Rep: Mark Sanderson, Date Disabled: 5/3/2009, Date IWP Sent: 7/21/2011, Referred By: , Other Comments: Very eager to find employment now; very active and self reliant in her searches, Employment Goal for IWP: a high school teacher (mathematics).
- Journal Log:** Ticket No.: 888-88-8888, Journal Date: 3/21/2012, Standard Tasks: , Required Tasks: , Freeform Entry: Closed FTD Entry: Be sure to remind Liz that a school district administrative position has opened up in Tampa, FL that fits her skills;.
- FollowUp To Do:** Ticket No.: 888-88-8888, Type: , Date FTD Logged: , FTD Target Date: , CPT? (checked), Date CPT: , Entry Description: .

The bottom of the screen shows record navigation: Record: 1 of 17, 15 of 18, Unfiltered, Search.

“Add Alt Contact Info” Button

The “Add Alt Contact Info” button on Tab 1: Personal opens a sub-form where the user can enter up to three (3) alternate contacts for the ticket-holder.

Alternate contact information is required for the IWP Report.

The screenshot displays the 'Client Forms Main Page' for a ticket holder. The top section contains fields for 'Ticket No.', 'First Contacted', 'Min. Dur.', 'Find Client', 'Consultant', 'Ticket Assigned', 'SSI / SSDI', 'Benef. Status', 'First Name', 'Middle Name', and 'Last Name'. Below these are tabs for 'Personal', 'Pre-Assignment', 'Education', 'Employment', 'Payment Detail', 'EN Supp Form', 'Journal Report', 'Follow Up', and 'Client Ops'. The 'Personal' tab is active, and a sub-form titled 'Client Alternate Contact Information' is open. This sub-form has a 'Close Form' button and fields for 'Ticket SSN', 'First Name', and 'Last Name'. It lists three alternate contacts with their respective details:

Alternate Contact No.	Contact Name	Address / City / State / Zip	Phone No.	Email Address
1	Ron Bowers	727 Lakeshore Dr Orlando, FL 10445	(888) 999-4444	rbowers@yahoo.com
2	Lucy Matthews	1899 Terrace Drive, P.O. Box 42 Miami, FL 08447	(777) 333-1111	Lucy84@gmail.com
3	David Mosier	643 Lanier Drive Memphis, TN 38684	(901) 444-5555	davemosier@aol.com

A red arrow points to the 'Add Alt Contact Info' button on the right side of the sub-form.

Tab 2: Pre-Assignment

1. Assignment History Questions
2. Pre-Assignment Work History
3. IWP Form Preparation
 - Preparation audit capability
 - Preparation of embedded Lookback Calendar
 - Print button to print IWP report
4. IWP Form Work History
 - Preparation of work history check boxes needed for IWP Report

The screenshot displays the 'Client Forms Main Page' for a client named Raymond J. Pizillo. The ticket number is 999-99-9999. The 'Pre-Assignment' tab is active, showing sections for 'Assignment History', 'Pre-Assignment Work', and 'IWP Form - Client Work History'. The 'Assignment History' section includes checkboxes for 'Ticket Previously Assigned?' and 'Services Provided By Prior EN?', a 'Type of Services' dropdown, and a 'Cash Benefit Amount' field. The 'Pre-Assignment Work' section has checkboxes for 'Worked Last 18 Months?' and 'Trial Work Period Months Used?', along with 'Date Last Worked' and 'Number of TWP Months Left' fields. The 'IWP Form - Client Work History' section contains several checkboxes regarding the client's work status since disability was awarded. Below these sections are tabs for 'Journal Log' and 'FollowUp To Do', each with a 'Save / New' button. The 'Journal Log' tab shows a 'Journal Date' of 11/5/2011 and a 'Freeform Entry' field. The 'FollowUp To Do' tab shows a 'Type' dropdown, 'Date FTD Logged', 'FTD Target Date', 'CPT?' checkbox, 'Date CPT', and an 'Entry Description' field. The bottom of the screen shows record navigation controls, indicating 1 of 5 records in the Journal Log and 1 of 1 records in the FollowUp To Do section.

Lookback Form

Lookback Month	Employer	Start Date	End Date	Wage/Hr	Hrs Work	Earnings	> TWL
Oct-11	No paycheck stubs						
Sep-11	FedEx Services	9/1/2011	9/30/2011	\$24.50	38.00	\$3,724.50	Y
Aug-11	FedEx Services	8/1/2011	8/31/2011	\$23.45	25.00	\$2,380.00	Y
Jul-11							
Jun-11							
May-11							
Apr-11							
Mar-11							
Feb-11							
Jan-11	Kinko's	1/1/2011	1/15/2011	\$14.75	40.00	\$2,470.00	Y
Dec-10	Kinko's	12/27/2010	12/31/2010	\$14.75	32.00	\$472.00	N

Example: Page 2, IWP Form

BENEFICIARY'S RECENT WORK HISTORY

Beneficiary acknowledges (please check all that apply):

- ☐ I have NOT worked since the date my disability was awarded.
- ☐ I HAVE worked since the date my disability was awarded.
- ☐ I am currently working.
- ☐ I had NO earnings in the last 18 months.
- ☒ I had SOME earnings in the last 18 months.
 - ☒ NONE of these earnings were within the last 6 months.
 - ☐ SOME of these earnings were within the last 6 months.

If you had earnings in the last 18 months, please describe those earnings by filling in the requested information on the chart provided below. Please list your most recent employer first.

Lookback Month	Employer Name	Start Date	End Date	Wage Per Hour	Hours Per Week	Earnings	> TWL
Oct-11	No paycheck stubs						
Sep-11	FedEx Services	09/01/11	09/30/11	\$24.50	38.00	\$3,724.50	Y
Aug-11	FedEx Services	08/01/11	08/31/11	\$23.45	25.00	\$2,380.00	Y
Jul-11							
Jun-11							
May-11							
Apr-11							
Mar-11							
Feb-11							
Jan-11	Kinko's	01/01/11	01/15/11	\$14.75	40.00	\$2,470.00	Y

Pre-Assignment Tab, Continued:

- The "Lookback Form" button opens the above form for Lookback preparation. The form is stored but can be edited.
- The example above shows the IWP Form, page 2 with the embedded Lookback Form

Tab 3: Education

Form input areas:

- Educational level
- Study focus
- A description for special skills
- Prior work experiences
- Professional Certification, if any
- A description of any impairments or limitations as provided by the ticket-holder

The screenshot displays the 'Client Forms Main Page' for a client named Martin L. Cowans. The 'Education' tab is active, showing various input fields for client information and education details. The 'Journal Log' and 'FollowUp To Do' sections are also visible at the bottom of the form.

Client Info:

- Ticket No.: 555-55-5555
- First Contacted: 04/05/11
- Min. Dur.: 80
- Consultant: 99
- Ticket Assigned: 06/13/11
- Find Client: [Buttons]
- SSI / SSDI: SSDI
- Benef. Status: Client-Level 2
- Advanced Search, Refresh, New, Save, Close
- First Name: Martin
- Middle Name: L.
- Last Name: Cowans

Education Tab:

- Personal, Pre-Assignment, **Education**, Employment, Payment Detail, EN Supp Form, Journal Report, Follow Up, Client Ops
- Education Level: Technical School
- Resume Required? ☐
- Study Focus: engine mechanics
- Special Skills: rebuild and repair auto engines
- Prior Work Experience: numerous auto repair shops and major auto sales locations for Chevrolet and Ford
- Professional Certification: Master Mechanics Certification 2007
- Impairment/Limitations:

Journal Log:

- Ticket No.: 555-55-5555
- Journal Date: 6/10/2011
- Standard Tasks: [Dropdown]
- Required Tasks: ☒
- Freeform Entry: IWP faxed to Maximus
- Print Report

FollowUp To Do:

- Ticket No.: 555-55-5555
- Type: Follow Up
- Date FTD Logged: 3/19/2012
- FTD Target Date: 3/25/2012
- CPT? ☐
- Date CPT:
- Entry Description: Be sure to contact Martin regarding job opportunities.
- Print Report

Record Navigation:

- Record: 12 of 18
- Unfiltered
- Search

Tab 4: Employment

1. An embedded form that allows input for an unlimited number of employers

2. Input areas:

- Working status check boxes
- Employer name, address, email address, phone
- Check box for employer medical coverage, if any (used on APOR report)
- Industry use code (on APOR)
- Date hired; date left job (used on APOR report)
- Rate/hour, hours/week, estimated monthly pay (used for APOR report)
- Check box to allow placement of employer on pay request form

Tab 5: Payment Detail

1. An embedded form that allows input for an unlimited number of payment requests. All payment requests are permanently stored for on-demand printing.
2. Input areas:
 - Allows both Evidentiary and Certification payment request types
 - Provides input area for P1M1, P1M2, P1M3 Service details
 - Administrative area is provided for payment tracking, pay-status tracking, amount, date submitted, date paid

The screenshot displays the 'Payment Detail' tab within the AllPro for Employment Networks software. The interface is divided into several sections:

- Client Forms Main Page:** This section at the top contains fields for 'Ticket No.' (888-88-8888), 'First Contacted' (07/12/11), 'Min. Dur.' (45), 'Consultant' (1), 'Ticket Assigned' (08/24/11), 'Benef. Status' (Client-Level 2), and 'Client Name' (Elizabeth F. Johnson). It also includes a 'Find Client' button and a 'Refresh' button.
- Payment Submission:** This section contains a 'Payment Control No.' (0001) and a 'Date Complete' field. It also has a 'Ticket No.' (444-33-4444) and a 'Print Pay Request' button.
- Evidentiary? Certification?:** This section allows users to select the type of payment request. It includes checkboxes for 'Evidentiary?' and 'Certification?'. If 'Certification?' is selected, it prompts for 'Type of Contact' and 'Date of Contact'.
- EN Services Details:** This section provides input areas for 'P1M1 Service Date', 'P1M2 Service Date', and 'P1M3 Service Date', each with a corresponding 'Description' field.
- Administrative Area - Pay Submission Tracking:** This section includes fields for 'Date Sent To EN', 'Milestone Type', 'Milestone / Outcome Months Description', 'Date Sent To Maximus' (10/7/2011), 'Amount of Payment Expected' (\$2,300.00), 'Milestone Type Confirmation' (P1 - Multi-Pmt), 'Month/Year Milestone Achieved', 'Maximus Date Approved / Denied', and 'Maximus Request Status'.

The bottom of the interface shows a status bar with 'Record: 14', '1 of 8', and a 'Search' button.

After preparation of the Payment Request on Tab 5, the report can be printed at any time or re-printed when necessary for any ticket-holder.

Example: Payment Request

EN Payment Request Form

Use this form to request Evidentiary Payment Requests (EPRs) or Certification Payment Requests (CPRs)

To ensure prompt and accurate payment to your Employment Network, please complete the following form and attach any acceptable earnings information required.

I. Employment Network Information

- EN Organization Name: Your Company Name
- DUNS Number (Data Universal Numbering System): 88-8999999
- Is the financial institution and bank account information provided in your Central Contractor Registration (CCR) current?
Yes ☐ No ☐ (If No, please visit www.ccr.gov and update your CCR registration with your current bank account information before submitting this request.)
Incorrect or outdated information in CCR will prevent payment issuance to your Employment Network.

II. Ticket-holder Information

- Ticket-holder's Name: Elizabeth F. Johnson
- Ticket Number/Social Security Number: 888-88-8888
- Name of Ticket-holder's Employer: Miami School District
- Employer's Address: 1100 Biscayne drive Miami, FL
- Payment Method for this Ticket Assignment:
A. Outcome Payment Method B. Milestone-Outcome Payment Method

III. Phase I - Milestone I Earnings Information *(Complete only if requesting Phase I Milestone I)*

Please choose one of the following options by placing an "X" next to your selection:

- The beneficiary achieved TWL earnings during the calendar claim month.
(TWL - \$720-2010 and 2011, \$700-2009, \$670-2008)
- The beneficiary achieved less than TWL, but is expected to achieve TWL earnings within the next 2 months.
- The beneficiary achieved less than TWL earnings and is not expected to achieve TWL earnings within the next 2 months.

Ticket to Work and Self-Sufficiency Program - Payment Request
P.O. Box 1422
Alexandria, VA 22313-1422
F-FMT-701-2 EN Payment Request Form V02

-1- FAX: 703-682-3289

Tab 6: EN Supp Form

An EN Supplemental Earnings Statement can be prepared within Tab 6. The form can be edited or “reset” if the user wants to start from scratch.

A “Print EN Supp Form” button is available to print the report at any time.

Note that the EN Supp Form data is stored within the database and can be recalled, edited or printed at any time.

The screenshot displays the 'Client Forms Main Page' with the 'EN Supp Form' tab selected. The form contains the following sections:

- Client Info:** Ticket No.: 222-22-2222, First Contacted: 07/06/11, Min. Dur.: 30, Find Client: [Buttons: Advanced Search, Refresh, New, Save, Close], Consultant: 4, Ticket Assigned: 09/14/11, SSI / SSDI: SSI, Benef. Status: NonWork Unassigned by A, First Name: Larry, Middle Name: M., Last Name: Chambers.
- Navigation Tabs:** Personal, Pre-Assignment, Education, Employment, Payment Detail, EN Supp Form (selected), Journal Report, Follow Up, Client Ops.
- Form Actions:** Prepare and Print EN Supplemental Form, Print EN Supp Form, **Reset Form** (highlighted in red).
- Payment Data Table:**

Payment Claimed Month:	Pay Period Beg:	Pay Period End:	Pay Date:	Hrs Worked:	Rate/Hr:	Total Gross:	YTD Gross:
Sept 2011	09/05/11	09/30/11	09/30/11	200.00	\$20.00	\$4,000.00	\$12,845.10
* Payment Claimed Month:							
- Journal Log:** Ticket No.: 222-22-2222, Journal Date: 11/5/2011, Standard Tasks: [Dropdown], Required Tasks: [Dropdown], Freeform Entry: Telephoned Mr. Chambers, [Print Report].
- Follow Up To Do:** Ticket No.: 222-22-2222, Type: Follow Up, Date FTD Logged: 9/19/2011, FTD Target Date: 9/22/2011, CPT? [Checkbox], Date CPT: [Dropdown], Entry Description: Be sure to contact Larry regarding job posting, [Print Report].

EN Supplemental Earnings Statement

From Tab 6: EN Supp Form, a fully formatted EN Supplemental Earnings Statement can be printed on-demand after making the changes and edits to the form.

Note that an option exists to save all reports within the AllPro application in .pdf format.



EN Supplemental Earnings Statement

If the primary evidence does not contain some required information, such as pay period end dates, please use this table to provide any missing information.

EN Organization Name: Your Company Name
DUNS Number: 888-999999

Beneficiary Name: Larry M. Chambers
Beneficiary Social Security Number: 222-22-2222

Please complete the Earnings Evidence Table below, listing each pay period on each line separately. Feel free to list multiple claim months for the same Ticket-holder on the same form.

Payment Claimed Month	Pay Period Beginning	Pay Period Ending	Pay Date	Hours Worked	Hourly Rate	Total Gross Earnings	YTD Gross Earnings
Sept 2011	09/05/11	09/30/11	09/30/11	200.00	\$20.00	\$4,000.00	\$12,845.10

EN Representative Name (Print): _____
EN Representative Signature: _____ Date: _____

Tab 7: Journal Report

1. An on-screen report that allows the user to review journal log entries for the ticket-holder shown at the top of the Client Forms page.
2. The Journal Report is available anytime and will reflect all entries at the time of viewing.
3. Users can scroll through all entries using the scroll bar at the side of the report.

Client Forms Main Page

Ticket No.: 555-55-5555 First Contacted: 04/05/11 Min. Dur.: 80 Find Client: [Buttons: Advanced Search, Refresh, New, Save, Close]

Consultant: 99 Ticket Assigned: 06/13/11

SSI / SSDI: SSDI Benef. Status: Client-Level 2

First Name: Martin Middle Name: L Last Name: Cowans

Personal Pre-Assignment Education Employment Payment Detail EN Supp Form **Journal Report** Follow Up Client Ops

Journal Date: 6/10/2011 Required Step? ☒ Journal Entry Description: IWP faxed to Maximus

Journal Date: 9/16/2011 Required Step? ☒ Journal Entry Description: Telephoned client

Journal Date: 9/19/2011 Required Step? ☐ Journal Entry Description: Consultant Changed To: Pam Walker (by Pam Walker)

Journal Log Ticket No.: 555-55-5555 [Buttons: Save / New]

Journal Date: 11/5/2011 Standard Tasks: [Dropdown] Required Tasks: [Dropdown] Freeform Entry: Email Sent To: client; Subject: Need payment stubs please; Email Sent by: Batch Email [Print Report]

Follow Up To Do Ticket No.: 555-55-5555 [Buttons: Save / New]

Type: Follow Up Date FTD Logged: 3/19/2012 FTD Target Date: 3/25/2012 CPT? ☐ Date CPT: [Dropdown]

Entry Description: Be sure to contact Martin regarding job opportunities. [Print Report]

Record: 1 of 7 [Buttons: No Filter, Search]

Record: 1 of 1 [Buttons: No Filter, Search]

Record: 12 of 18 [Buttons: Unfiltered, Search]

Tab 8: Follow Up

1. An on-screen, fully editable form that displays all open tasks for the ticket-holder.
2. Note that a late task displays a “Days to Target” total in **yellow**.
3. The user can edit a specific task date or entry description using this form.
4. After edit, the user can click “Save” to save the work done.

The screenshot shows the 'Client Forms Main Page' for ticket 555-55-5555. The 'Follow Up' tab is active, displaying a list of tasks. The first task is 'Send Mr. Cowans a copy of the job search report' with a target date of 12/8/2011 and a logged date of 3/20/2012. The 'Days to Target' is -103, highlighted in yellow. The second task is 'Be sure to contact Martin regarding job opportunities' with a target date of 3/25/2012 and a logged date of 3/19/2012. The 'Days to Target' is 5. The third task is a new entry with a target date of 3/25/2012 and a logged date of 3/19/2012. The 'Days to Target' is 1. The form also includes a 'Journal Log' section with a 'Print Report' button. The bottom of the form shows record navigation and search options.

Tab 9: Client Ops

For the ticket-holder shown at the top of the form:

- The user can print IWP form, journal service record, or payment submission detail report.
- Follow-Up / To Do open item report is also available as well as a detailed client profile.
- If desired, the user can a “cut and paste” client mailing label for the ticket-holder shown.
- Finally, a custom email or letter can be emailed or printed for the ticket-holder. Journal entries are auto-logged for email and letter printing activities.

The screenshot displays the 'Client Forms Main Page' for a client named Elizabeth F. Johnson. The page is organized into several sections:

- Client Info:** Ticket No.: 888-88-8888, First Contacted: 07/12/11, Min. Dur.: 45, Ticket Assigned: 08/24/11, Benef. Status: Client-Level 2, First Name: Elizabeth, Middle Name: F., Last Name: Johnson.
- Production Reports - Single Client:** Includes options to print IWP Form, Journal / Service Record Report, and Payment Submission Detail Report, each with 'Print Preview' and 'Save to .pdf' buttons.
- Administrative Reports - Single Client:** Includes options to print Follow-Up / To Do Open Items Report and Print Client Profile Detail - Single Client, each with 'Print Preview' and 'Save to .pdf' buttons.
- Client Address Label - This Client:** Includes an 'Open Client Label Form' button.
- Client Communications:** Includes buttons for 'Prepare Custom Email' and 'Prepare Letter'.
- Journal Log:** Ticket No.: 888-88-8888, Journal Date: 11/9/2011, Standard Tasks: [dropdown], Required Tasks: [checkbox], Freeform Entry: Email Sent To: client; Subject: New Job; Email Sent by: Pam Wallace. Includes a 'Print Report' button.
- FollowUp To Do:** Ticket No.: 888-88-8888, Type: To Do, Date FTD Logged: 11/4/2011, FTD Target Date: 11/9/2011, CPT? [checkbox], Date CPT: [dropdown], Entry Description: Be sure to remind Liz that a school district administrative position has opened up in Tampa, FL that fits her skills. Includes a 'Print Report' button.

The bottom of the page shows record counts: 'Record: 1 of 16' for the Journal Log and 'Record: 1 of 1' for the FollowUp To Do section.

From Tab 9: Client Ops, the user can select the “Prepare Custom Email” button.

- A sub-form opens that contains standard email topics, messages and close information that the user can select over and over again.
- All standard messages are saved in the database.
- New messages can be added at any time for current or future use.
- Old messages can be edited and re-saved for immediate use.
- By clicking “Send Email”, Outlook is invoked to send the email.
- Email recipient, subject, sender identification and date are auto-logged in the journal.

Prepare Custom Email

The screenshot displays the 'Custom Client Email' form within the AllPro software interface. The form is titled 'Email Client' and includes a 'Send Email' button. The 'Subject' field is populated with 'Congratulations on your new job!'. The 'Message' field contains the text: 'Congratulations! We are very happy for you and will continue to mentor, coach and provide assistance as needed to help you grow in your new position. Don't forget - - we will need copies of your pay stubs! We will send to you several stamped, self-addressed envelopes for your convenience.' The 'Close' field is currently empty. A 'Microsoft Office Access' dialog box is overlaid on the form, asking 'Send email and journalize record?' with 'Yes' and 'No' buttons. The background shows the 'Client Forms Main Page' with various tabs and fields, including 'Ticket No.', 'First Contacted', 'Min. Dur.', and 'Find Client'.

From Tab 9: Client Ops, the user can select the “Prepare Letter” button.

- A sub-form opens that contains standard letter topics, messages and close information that the user can select over and over again.
- All standard messages are saved in the database.
- New messages can be added at any time for current or future use.
- Old messages can be edited and re-saved for immediate use.
- By clicking “Print Letter”, a letter is prepared for printing.
- Letter recipient, subject, sender identification and date are auto-logged in the journal.

Prepare Letter To Ticket-Holder

The screenshot displays the 'Client Forms Main Page' with a 'Prepare Letter For Client' sub-form open. The sub-form has a green header with the title 'Prepare Letter For Client' and buttons for 'Print Letter', 'Save / New', and 'Close Form'. The main content area contains a 'Subject' dropdown menu, a 'Message' text area with pre-filled text, and a 'Close' text area. The background form shows client information for Elizabeth F. Johnson, Ticket No. 888-88-8888, and various dates and statuses.

Client Forms Main Page

Ticket No.: 888-88-8888 First Contacted: 07/12/11 Min. Dur.: 45 Find Client: [Find]

Client Info Consultant: 1 Ticket Assigned: 08/24/11

SSI / SSDI: SSDI Benef. Status: Client-Level 2

First Name: Elizabeth Middle Name: F. Last Name: Johnson

Personal Pre-Assignment Education Employment Payment Detail FN Supp Form Journal Report Follow Up Client Ops

Prepare Letter For Client

Print Letter Save / New Close Form

Subject: [Dropdown]

Message: Congratulations! We are very happy for you and will continue to mentor, coach and provide assistance as needed to help you grow in your new position.

Don't forget - - we will need copies of your pay stubs! We will send to you several stamped, self-addressed envelopes for your convenience.

Close: [Text Area]

From Tab 9: Client Ops, the user can select the “Prepare Letter” button.

The example of the letter (shown right) can be printed or saved to .pdf format at any time.

The letter content is pulled from the same standard content file that is used for sending emails. At times, a ticket-holder may not have email and will need to receive a letter instead.

Again, a journal log of the letter is saved automatically.

Example: Letter To Ticket-Holder

The screenshot shows a software window titled "Report" containing a letter template. The template is divided into three main sections. The top section, separated by a horizontal line, contains the company information: "Your Company Name", "Consultant: Pam Wallace", "AnyBox 0444", "Anytown, TN 38999-0444", "Phone: (800) 444-9999", and a blue hyperlink "pam@yourcompany.com". The middle section contains the date "March 21, 2012", the recipient's name and address "Elizabeth Johnson", "45 Biscayne, Box 1184", "Miami, FL 08445", and the subject line "RE: Happy Birthday!". The bottom section contains the salutation "Dear Elizabeth:", a birthday wish "You have a birthday this month. We hope that you have a great birthday!", another birthday wish "Our birthday wish for you is that we can help you meet your self-sufficiency needs. Have a great day!", and a signature block with the placeholders "Your Name", "Your Company", and "Your Address".

Your Company Name
Consultant: Pam Wallace
AnyBox 0444
Anytown, TN 38999-0444
Phone: (800) 444-9999
pam@yourcompany.com

March 21, 2012

Elizabeth Johnson
45 Biscayne, Box 1184
Miami, FL 08445

RE: Happy Birthday!

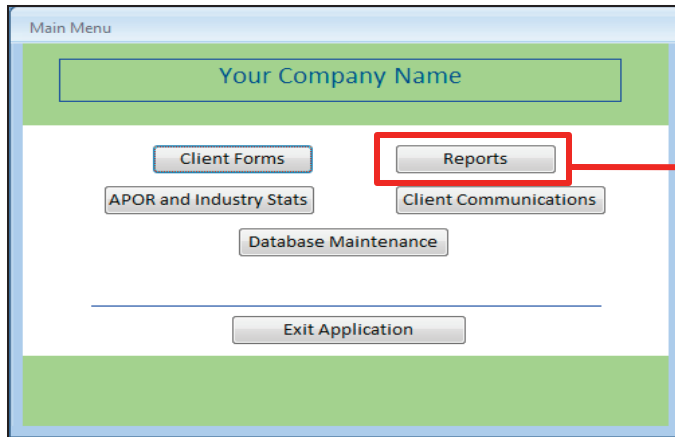
Dear Elizabeth:

You have a birthday this month. We hope that you have a great birthday!

Our birthday wish for you is that we can help you meet your self-sufficiency needs. Have a great day!

Your Name
Your Company
Your Address

Main Menu: Reports



Main Menu

Your Company Name

Client Forms

APOR and Industry Stats

Database Maintenance

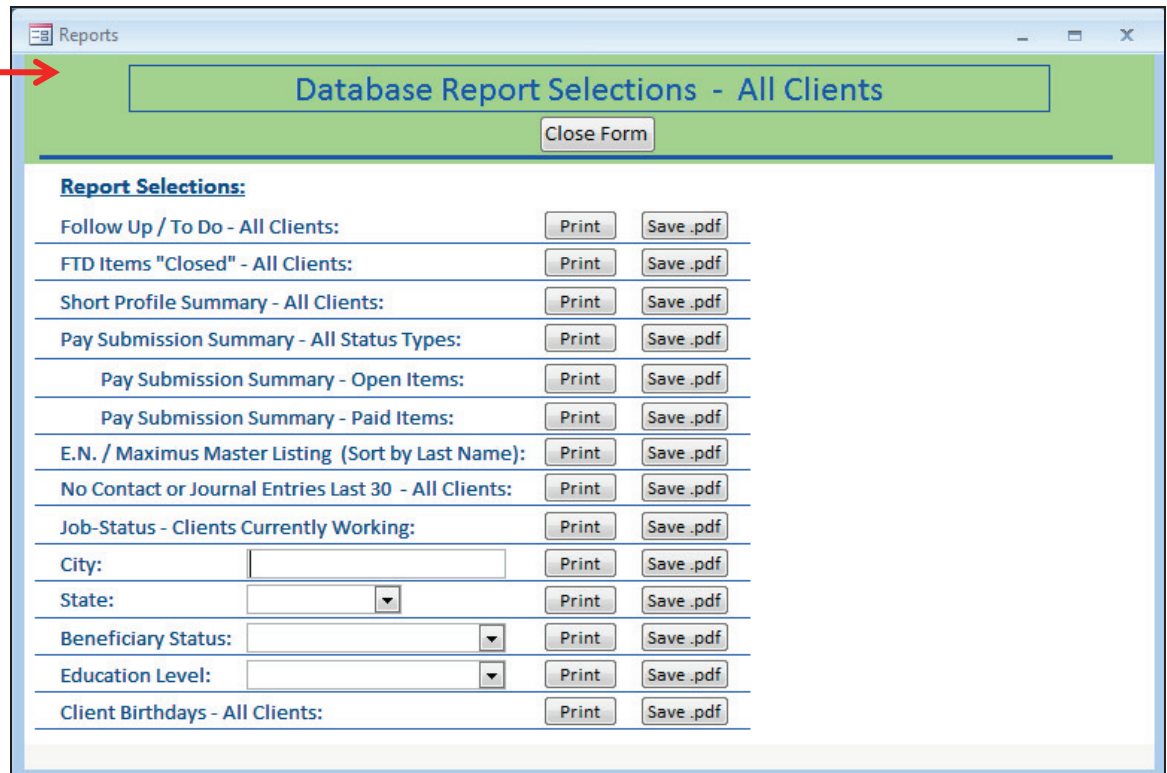
Exit Application

Reports

Client Communications

A red box highlights the 'Reports' button, with a red arrow pointing to the 'Database Report Selections - All Clients' window.

- The Reports sub-menu provides a selection of reports printed for “all” ticket-holders.
- Reports can be reviewed on-screen or printed or saved as .pdf format.



Reports

Database Report Selections - All Clients

Close Form

Report Selections:

Follow Up / To Do - All Clients:	Print	Save .pdf
FTD Items "Closed" - All Clients:	Print	Save .pdf
Short Profile Summary - All Clients:	Print	Save .pdf
Pay Submission Summary - All Status Types:	Print	Save .pdf
Pay Submission Summary - Open Items:	Print	Save .pdf
Pay Submission Summary - Paid Items:	Print	Save .pdf
E.N. / Maximus Master Listing (Sort by Last Name):	Print	Save .pdf
No Contact or Journal Entries Last 30 - All Clients:	Print	Save .pdf
Job-Status - Clients Currently Working:	Print	Save .pdf
City: <input type="text"/>	Print	Save .pdf
State: <input type="text"/>	Print	Save .pdf
Beneficiary Status: <input type="text"/>	Print	Save .pdf
Education Level: <input type="text"/>	Print	Save .pdf
Client Birthdays - All Clients:	Print	Save .pdf

Report Example: Follow-Up / To Do Report – All Clients

- An excellent report that could be reviewed or printed each day to ensure that all tasks are being worked and are on schedule!
- Tasks behind schedule have a “Days to Target” number highlighted in yellow.

The screenshot displays a web application window titled 'report - FTDMasterReport'. The main heading is 'Follow-Up / To Do Report - All Clients'. It lists three client entries, each with a consultant, name, ticket number, primary phone, beneficiary status, target date, date logged, entry description, type, and days to target. The 'Days to Target' values are highlighted in yellow for the second and third entries.

Consultant	Name	Ticket No.	Primary Phone	Beneficiary Status	Target Date	Date Logged	Entry Description	Type	Days to Target	FTD Age
11 - Shea Reems	Mary P. Masters	111-11-1111	(888) 888-8888	Client-Working-Not Looking For Wor		10/23/2011		Follow Up		151
4 - Becky Martin	Larry M. Chambers	222-22-2222	(777) 777-7777	NonWork Unassigned by A	9/22/2011	9/19/2011	Be sure to contact Larry regarding job posting	Follow Up	-182	185
99 - Admin	Martin L. Cowans	555-55-5555	(999) 555-5555	Client-Level 2	12/8/2011	3/20/2012	Send Mr. Cowans a copy of the job search report as quickly as possible.	To Do	-105	2

Report Example: Summary Profile – All Clients

- This report can be used to quickly view or print a brief profile of all clients in the AllPro database application.
- Name, contact info, email address, phone, employment goal and impairment – limitations are all provided on the report.

The screenshot shows a software window titled "Summary Profile Report". Inside, there's a green header bar with the text "Summary Profile Report: All Clients". Below this, the report is organized into sections for each client. The first section is for Consultant "1 - Pam Wallace" with a Client Count of 4. It lists details for Timothy S. Bellamy, including Name, Address, City, State, Zip, Ticket No., Beneficiary Status, SSI / SSDI, Phone 1, and Phone 2. The second section is for Kenneth J. Hankins, and the third is for Elizabeth F. Johnson. Each section includes the same set of fields as the first. The report is presented in a clean, tabular format with dashed lines separating the fields.

Consultant:	Client Count:
1 - Pam Wallace	4
Client 1: Timothy S. Bellamy	
Name:	Timothy S. Bellamy
Ticket No:	222-55-2222
SSI / SSDI:	Client-Level 3
Address:	
Beneficiary Status:	
City:	
State:	
Zip:	
Phone 1:	
Phone 2:	
Employment Goal:	
Impairment/Limitations	
Client 2: Kenneth J. Hankins	
Name:	Kenneth J. Hankins
Ticket No:	663-33-6633
SSI / SSDI:	Client-Level 3
Address:	
Beneficiary Status:	
City:	
State:	
Zip:	
Phone 1:	
Phone 2:	
Employment Goal:	
Impairment/Limitations	
Client 3: Elizabeth F. Johnson	
Name:	Elizabeth F. Johnson
Ticket No:	888-88-8888
SSI / SSDI:	SSDI
Address:	45 Biscayne Box 1184
Beneficiary Status:	Client-Level 2
City:	Miami
State:	FL
Zip:	08445-
Phone 1:	(777) 888-8888
Phone 2:	
Employment Goal:	
Impairment/Limitations	

Report Example: Payment Submission Summary

- A master summary of all ticket-holders for which a payment request was submitted.
- Name, SSN, Submission date, milestone-type, control number and submission status are all shown along with respective amounts submitted for payment.
- Three versions of this report are available on the “Reports” menu.

Payment Submission Summary						
(Sorted by Consultant, Ticket Number and Date Submitted to Maximus)						
Name	Ticket No.	Date Sub.	Milestone Type	Control No.	Submission Status	
Consultant: 01 - Pam Wallace						
Elizabeth F. Johnson	888-88-8888	10/03/11	P1 - M2	0007	Submitted - Pending	1,245.00
Consultant Sub-Total						\$1,245.00
Consultant: 04 - Becky Martin						
Larry M. Chambers	222-22-2222	10/03/11	Outcome	0006	Resubmitted - Pending	645.00
Consultant Sub-Total						\$645.00
Consultant: 11 - Shea Reems						
Mary P. Masters	111-11-1111	09/30/11	P1 - M1	0005	Submitted - Pending	1,250.00
Mary P. Masters	111-11-1111	10/12/11	Outcome	0002	Paid	364.00
Consultant Sub-Total						\$1,614.00
Consultant: 99 - Admin						
Jamie Lynn McFadden	444-33-4444	10/07/11	P1 - Multi-Pmt	0001	Submitted - Pending	2,300.00
Jamie Lynn McFadden	444-33-4444	10/11/11	P1 - M2	0004	Paid	1,250.00
Jamie Lynn McFadden	444-33-4444	11/02/11	Outcome	0008	Resubmitted - Pending	728.00
Martin L. Cowans	555-55-5555	08/19/11	P1 - M3	0003	Resubmitted - Pending	1,250.00
Consultant Sub-Total						\$5,528.00
Grand Total All Consultants:						\$9,032.00
Report Date:			3/21/2012			
			Page 1 of 1			

Report Example: Master Client Listing

- A summary of all ticket-holders within the database.
- Information includes:
 - SSN
 - Name
 - State
 - Assignment date
 - Consultant number and name responsible for the ticket-holder
 - Beneficiary status

Summary Profile Report

Master Client Listing

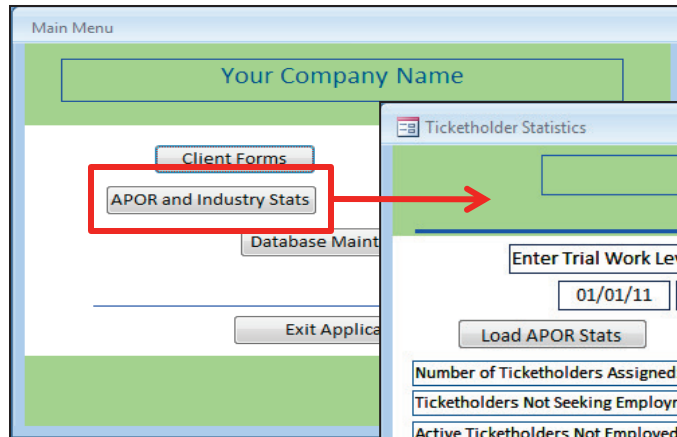
TicketSSN:	Client Name:	State:	Assign Date:	Consultant:	Beneficiary Status:
222-55-2222	Bellamy, Timothy S.		9/6/2011	1 - Pam Wallace	Client-Level 3
111-11-1114	Brannon, Jill C.		1/5/2011	2 - Al Nichols	Client-Level 3
111-11-1115	Brooks, Mitchell K.			2 - Al Nichols	Client-Level 3
222-22-2222	Chambers, Larry M.	AZ	9/14/2011	4 - Becky Martin	NonWork Unassigned by A
555-55-5555	Cowans, Martin L.	MS	6/13/2011	99 - Admin	Client-Level 2
663-33-6633	Hankins, Kenneth J.		9/5/2011	1 - Pam Wallace	Client-Level 3
888-88-8888	Johnson, Elizabeth F.	FL	8/24/2011	1 - Pam Wallace	Client-Level 2
991-11-9991	Kinsey, Melissa S.		11/24/2011	11 - Shea Reems	Pending
111-11-1111	Masters, Mary P.	TN	9/13/2011	11 - Shea Reems	Client-Working-Not Looking
444-33-4444	McFadden, Jamie Lynn		1/30/2011	99 - Admin	Client-Working
222-78-8722	McKee, Marie P.	TN		99 - Admin	Client-Level 3
999-99-1111	Middleton, Kate M.	AL	9/1/2011	1 - Pam Wallace	Working Unassigned by Clie
448-88-8844	Peterson, Tom J.		9/30/2011	2 - Al Nichols	Pending
999-99-9999	Pizillo, Raymond J.	TX	1/15/2011	4 - Becky Martin	Client-Level 1
442-42-4422	Pujols, Albert		9/5/2011	2 - Al Nichols	Terminated - Other
222-25-2222	Riddick, Michael M.		8/10/2011	11 - Shea Reems	Client-Level 2
222-22-2225	Robison, Shannon G.	OH	8/18/2011	4 - Becky Martin	
561-56-1666	Tate, Melissa J.	GA	11/8/2011	4 - Becky Martin	Client-Level 2

Report Example: No Contact Last 30+ Days

- A very useful report to let the database administrator or user know which ticket-holders have not received any contact via U.S. Mail, email or phone in over 30 days.
- Extremely important report to ensure that SSA service and communication guidelines are being met.

The screenshot shows a software window titled "Summary Profile Report". At the top, a green banner displays the report title: "No Contact or Journal Entries (Last 30 Days +): All Clients". Below this, the window lists three client profiles. Each profile includes fields for Consultant, Name, Address, City, State, Zip, Ticket No., SSI / SSDI, Beneficiary Status, and Phone numbers. The first client is Martin L. Cowans, Ticket No. 555-55-5555, Client-Level 2. The second is Jamie Lynn McFadden, Ticket No. 444-33-4444, Client-Working. The third is Marie P. McKee, Ticket No. 222-78-8722, Client-Level 3. Each profile also includes an "Employment Goal" and "Impairment/Limitations" section.

Client Count:	3						
Consultant:	Admin						
Name:	Martin L. Cowans	Ticket No:	555-55-5555	SSI / SSDI:	SSDI		
Address:	142 Autumn Oaks Drive	Beneficiary Status:	Client-Level 2				
City:	Lamar	State:	MS	Zip:	38642-	Phone 1:	(999) 555-5555
Email:	al@allpro-group.com	Phone 2:	(555) 444-4444				
Employment Goal:	a auto specialist and master mechanic						
Impairment/Limitations							
Name:	Jamie Lynn McFadden	Ticket No:	444-33-4444	SSI / SSDI:			
Address:		Beneficiary Status:	Client-Working				
City:		State:		Zip:		Phone 1:	
Email:						Phone 2:	
Employment Goal:							
Impairment/Limitations							
Name:	Marie P. McKee	Ticket No:	222-78-8722	SSI / SSDI:			
Address:	89 Mickey Drive	Beneficiary Status:	Client-Level 3				
City:	Memphis	State:	TN	Zip:		Phone 1:	(901) 458-1234
Email:	al@allpro-group.com	Phone 2:					
Employment Goal:							



Main Menu: APOR and Industry Sector Statistics

Ticketholder Statistics

Employment Network APOR and Industry Sector Statistics

Close Form Refresh Page

Enter Trial Work Level: 720

01/01/11 12/31/11

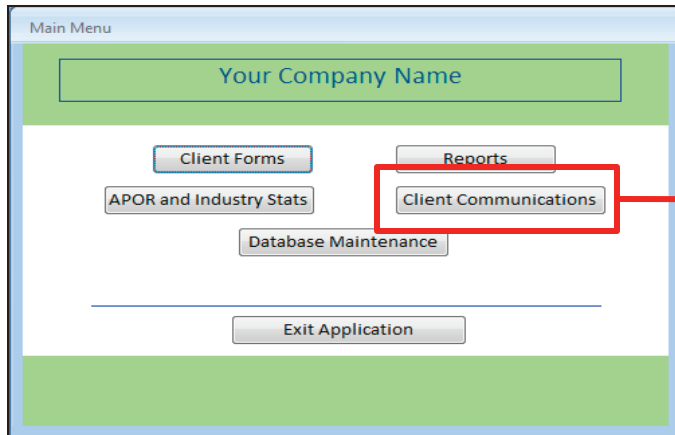
Load APOR Stats Load Industry Stats

Number of Ticketholders Assigned:	16
Ticketholders Not Seeking Employment:	3
Active Ticketholders Not Employed (Receive Services)	8
Number of Ticketholders Placed At TWL:	8
Percent Ticketholders Placed at TWL:	50.00%
Average Time Signing IWP to Job Placement (In Days):	42.78
Average Hours Worked Per Week:	35.78
Average Hourly Wage:	27.72
Percent Placements With Health Coverage:	33.33%
Percent Retention (Working >= 6 Mos. in Date Range):	62.50%
Percent Retention (Working >= 6 Mos. All-Time):	62.50%
Ticketholders With Benefits Suspended:	2
Total Count of Clients in Database:	18
Total Count of Clients Less Benef. Status Unassigned:	16
Stats Update Time Stamp:	3/21/2012 3:29:39 PM

Industry Sector	Number of Placements Per Annual Salary Range							
	<\$10,000	\$10,000 to \$24,999	\$25,000 to \$39,999	\$40,000 to \$54,999	\$55,000 to \$69,999	\$70,000 to \$84,999	\$85,000 to \$100,000	>\$100,000
Agriculture								1
Auto and Transportation Services		1						
Banking / Financial Services								
Beverages / Food								
Business Services								
Construction								
Consumer Services / Retail								
Education				1				
Electronics								
Energy and Utilities								
Environmental Services and Equip								
Government			2					1
Health Care / Pharmaceuticals								
Manufacturing							1	
Insurance								
Media								
Nonprofit / Membership Organiz								
Real Estate								
Security Products / Services								
Technology (Computer Hardware								
Telecommunications Equipment								
Other				1				
--- End of Report ---								

- Enter TWL amount and time frame at top of form.
- Use the two "Load" buttons to perform a recalculation at any time.

An on-demand report that provides statistics and industry sector information for any time frame or trial-work-level amount entered.



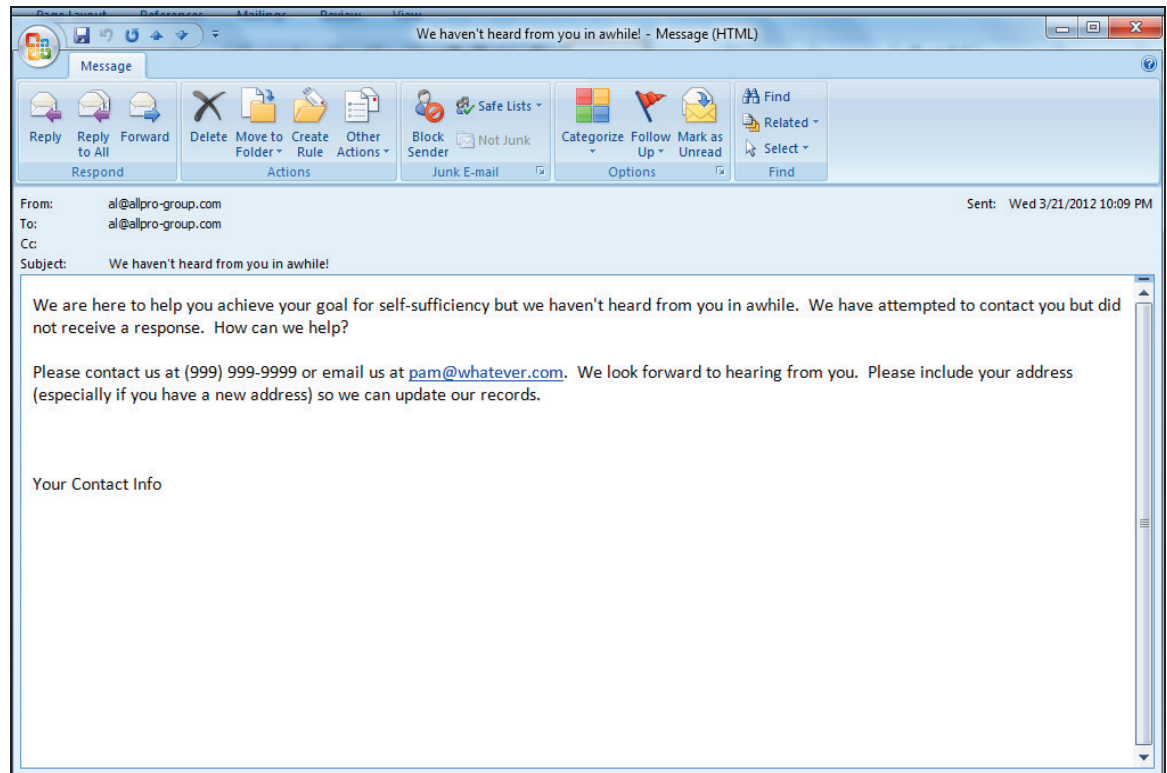
Main Menu: Client Communications

A screenshot of the 'Email ALL Clients' form. The title bar says 'Email ALL Clients'. The form has a green header bar with 'Email ALL (or Select) Clients'. Below this, there are buttons for 'Send Email', 'Save / New', and 'Close Form'. A dropdown menu for 'Select Email Target Group:' is open, showing a list of options: 'All', 'Client-Level 1', 'Client-Level 2', 'Client-Level 3', 'Client-Working-Not Looking For Work', 'Client-Working-Looking For New Work', 'Client-Inactive', 'Pending', 'Pending-IWP Not Returned', 'Working Unassigned by Client', 'NonWork Unassigned by EN', 'NonWork Unassigned by Client', 'Terminated - Age', and 'Terminated - Other' (which is highlighted). The 'Subject:' field contains 'We haven't heard from you in awhile'. The 'Message:' field contains a template email body. The 'Close:' field contains 'Your Contact Info'.

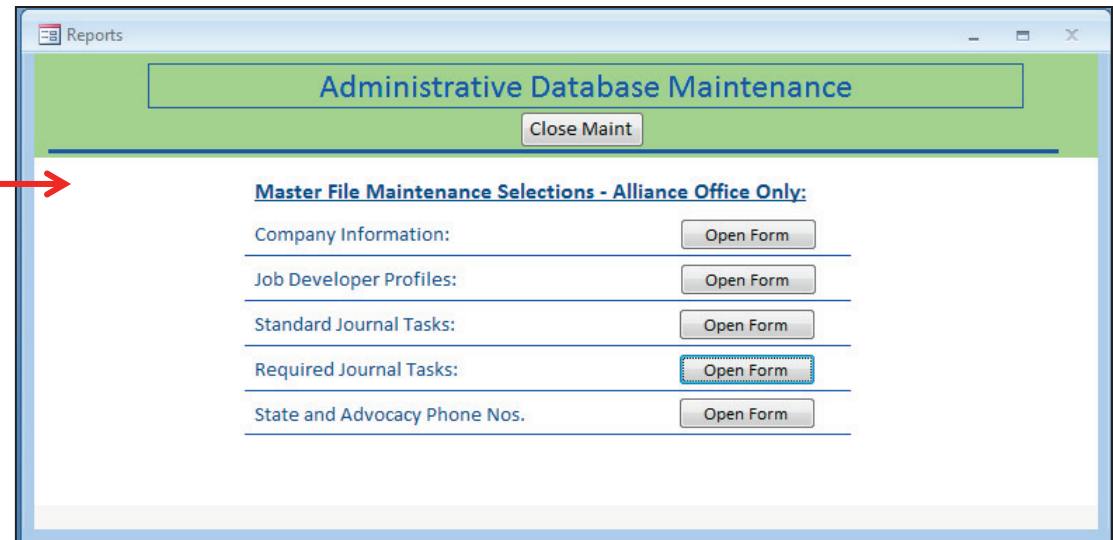
- From the Client Communications form you can send batch emails to all or a segment of your ticket-holder base.
- Emails are sent separately and discreetly.
- Each email sent is logged to the ticket-holder's journal.
- Topics can be created, edited and saved for current and future use. Create as many topics as you wish.

Example: Email to Ticket-Holder

- After selecting “Client Communications” from the Main Menu, the user can select a topic and a group based on beneficiary status to send the emails.
- An example of the Outlook email screen is shown to the right.
- Note that the Outlook email screen for “new” email is populated automatically by the topic selected in the AllPro application.



Main Menu: Database Maintenance



- In any database application, some master files must be built to allow the application to run properly.
- The Main Menu provides a database maintenance feature that allows the user / administrator an opportunity to work with five key areas:
 1. Company Information
 2. Job Developer Profiles (Consultant or employee)
 3. Standard Journal Tasks
 4. Required Journal Tasks
 5. States of Residency and State Advocacy Phone Numbers

Database Maint. – Company Information

- An administrator will use this form to begin setting up the database application for first use.
- On this form, the user can provide company I.D. number, name, contact information, email addresses, web site information, IRS Employer Identification Number and DUNS number.
- The data is stored permanently and more than one company can be set up for use.
- Proper completion of this form is essential.

The screenshot shows a web-based form titled "Company Information Maintenance" within a window labeled "Company Maintenance". The form contains the following fields and values:

Company No.:	<input type="text"/>	Address:	P.O. Box 9999	
Company Name:	Your Company Name		Address:	<input type="text"/>
City:	AnyCity	State:	TN	Zip: <input type="text"/>
Key Contact (On Pay Submission Form):	Key Contact Person			
Company Short Name:	<input type="text"/>	Company EIN:	<input type="text"/>	DUNS No: 888-999999
Primary Phone (On Pay Submission Form):	(901) 222-5555	Secondary Phone Number:	<input type="text"/>	
Fax Phone No. (On Pay Submission Form):	(662) 333-9999			
Primary Email Address (On Pay Submission Form):	keycontact@yourcompany.com			
Secondary Email Address:	keyperson@yourcompany.com			
CompanyWebAddr:	www.yourcompany.com			

Buttons: "Close Form" and "Save / New".

The data stored in the Company Information table is used throughout the application and on reports like the IWP Report, Pay Request and even letters mailed to ticket holders.

Database Maint. – Job Developer Profiles

- An administrator will use this form to set up an Employment Network's staff (LLC members, consultants, employees).
- From this form, the AllPro database administrator can set up passwords for staff members who will have access to the AllPro app.
- Both personal and business contact information can be provided for as many persons as needed.
- Information is used on an assortment of reports including the IWP Report.

The screenshot shows the 'Job Developer Maintenance' form. It has a title bar 'Job Developer Maintenance' and a green header with 'Job Developer Maintenance' and a 'Close Form' button. The form is divided into two main sections: 'Personal Information' and 'Business Information'. The 'Personal Information' section includes fields for Consultant Name (Pam Wallace), Developer SSN (222-32-3223), Home Address, Home Address 2, Personal Phone No., Personal Email (pam@yourcompany.com), Consultant No. (1), Spouse Name, City, State (dropdown), Zip, and Cell Phone. The 'Business Information' section includes fields for Active / Inactive (Active), Date Began as Contractor, Date Began as Employee, Business Address (AnyBox 0444), Zip (38999-0444), Business Phone ((800) 444-9999), Alternate Business Phone, Business Email (pam@yourcompany.com), All-Pro Password (Pam1), Employee Or Contr. (LLC Member), Date End as Contractor, Date End as Employee, City (Anytown), State (TN), and Fax Phone ((800) 444-8888). At the bottom, there is a record navigation bar showing 'Record: 1 of 5' and a search bar.

Important! A user must have database administrator access to access all forms. Each staff member can, however, access their respective form for editing purposes.

- A typical user, consultant or employee can only see those ticket-holders assigned to them.
- Consultant number 99, however, is reserved for Administrative tasks.
- Any person within an Employment Network having access to an “Admin” password can perform any type of database maintenance and have access to all forms, ticket-holders and reports.
- In short, an “Admin” can perform any task within the database application and see all records.

Job Developer Profiles – Using “Consultant No. 99”

The screenshot displays the 'Job Developer Maintenance' form. The title bar reads 'Job Developer Maintenance'. Below the title bar is a green header with the text 'Job Developer Maintenance' and a 'Close Form' button. The form is divided into two main sections: 'Personal Information' and 'Business Information'. The 'Personal Information' section includes fields for Consultant Name (Admin), Developer SSN, Home Address, Home Address 2, Personal Phone No., Personal Email, Consultant No. (99), Spouse Name, City, State, Zip, and Cell Phone. The 'Business Information' section includes fields for Active / Inactive (Active), Date Began as Contractor, Date Began as Employee, Business Address, Zip, Business Phone, Alternate Business Phone, Business Email, Employee Or Contr., Date End as Contractor, Date End as Employee, All-Pro Password (Admin88), and Fax Phone. The bottom of the form shows a record count of 5 of 5, a 'No Filter' button, and a search bar.

Personal Information	
Consultant Name:	Admin
Developer SSN:	DOB
Home Address:	
Home Address 2:	
Personal Phone No.:	Cell Phone:
Personal Email:	
Consultant No.:	99
Spouse Name:	
City:	State:
Zip:	

Business Information	
Active / Inactive:	Active
Date Began as Contractor:	
Date Began as Employee:	
Business Address:	City:
Zip:	State:
Business Phone:	Extension:
Alternate Business Phone:	Fax Phone:
Business Email:	
All-Pro Password:	Admin88
Employee Or Contr.:	
Date End as Contractor:	
Date End as Employee:	

Record: 5 of 5 | No Filter | Search

- Slide number 6 provides a good picture of the Journal Log form. On the form, you will notice a drop-down arrow for “Standard Tasks”.
- The Database Maint – Standard Journal Tasks form provides an opportunity for the Admin to add/alter/update the standard tasks that appear when the Journal drop-down box arrow is selected.
- All edits are stored within the database and will remain there until changed or edited.

Database Maint. – Standard Journal Tasks

StandardTas	Standard Task
1	Telephoned Client
3	Client telephoned Alliance
4	Emailed Client
5	Client Emailed Alliance
6	Mailed information to Client
7	Received mail from Client
8	Ticket assigned
9	Ticket unassigned
10	Ticket terminated
11	Beneficiary status changed
12	Confirmed eligibility with MAX
13	Getting Started Packet mailed to client
14	Initial Resume work
15	Resume' revision / rework
16	PASS Plan Info or assistance

- Functionality for this form is virtually identical to that for Standard Journal Tasks.
- The Database Maint – Required Journal Tasks form provides an opportunity for the Admin to add/alter/update the required tasks that appear when the Journal drop-down box arrow is selected.
- All edits are stored within the database and will remain there until changed or edited.

Database Maint. – Required Journal Tasks

frmRequiredTasks

Required Tasks - Journal Maintenance

Close Form

Save / New

Task Key:

Task Description:

Task Key	Task Description
1	Initial Contact / Interview
2	Confirmed eligibility with Maximus. (Be sure to add name of MAX contact.)
3	IWP Mailed to Beneficiary
4	Work/Have Not Work Letter mailed to beneficiary
5	BPQY SSA Release Form mailed to beneficiary
6	BPQY IRS Release Form mailed to beneficiary
7	Employer - Authorization for Release of Info Form mailed to beneficiary
8	Signed IWP received from beneficiary
9	Signed Work/Have Not Work Letter received from beneficiary
10	Signed BPQY SSA Release Form received from beneficiary
11	BPQY IRS Release Form received from beneficiary
12	Employer - Authorization for Release of Info Form received from beneficiary
13	Info on Client Initial Intake Screen complete

Record: 1 of 17

- AllPro Database Maint also provides a way to edit a table storing U.S. State descriptions, abbreviations, and State advocacy phone numbers.
- State advocacy phone numbers are required for the IWP Report.
- AllPro Release 5.0 will automatically populate the advocacy phone number on the IWP whenever a ticket-holder's mailing information (including state) is completed on the Tab 1: Personal form.
- All information is stored within the database.

Database Maint. – State and Advocacy Phone Nos.

The screenshot displays the 'Maintain States' window. At the top, there's a green header bar with the title 'State and Advocacy Phone No. Maintenance'. Below this, there's a 'Close Form' button. To the right of the header, there are navigation arrows and a 'Save / New' button. The main area of the window contains three form fields: 'State Full Name:' with the value 'ALABAMA', 'State Abbreviation:' with the value 'AL', and 'State Advocacy Phone No:' with the value '(800) 826-1675'. At the bottom of the window, there's a status bar that reads 'Record: 1 of 56' and 'No Filter'.

AllPro for ENs – Deployment Configurations

It is important to note that the AllPro for ENs database application is technically a “Desktop Solution”. Desktop solutions, typically, are designed to reside and operate on a single desktop PC or laptop. The AllPro application, however, is capable of more.

Deployment opportunities differ, EN to EN. Below are three key possibilities:

1. Single User / Single Business Office Location,
2. Multiple Users / Single Business Office Location,
3. Multiple Users / Multiple Business Office Locations.

A possible solution does exist for each scenario and those will be discussed in the following slides. Keep in mind that the underlying MicroSoft application needed to run AllPro for Employment Networks is MicroSoft Access 2010. For best performance, use the Windows 7 operating system (fully updated) and a PC or Laptop having 4GB or more of internal memory (RAM).

Deployment Configuration: Single User / Single Business Office Location

This is the most simple, least complex and least expensive configuration.

Potential Configuration:

- 1 Desktop PC or Laptop (Windows 7 Operating System)
- 1 External Storage Device (for backup purposes)
- 1 MicroSoft Office Professional 2010 License (includes MicroSoft Access)
- 1 AllPro for ENs software license
- Access to a voice/data (i.e. internet) provider (either a link to a cable, DSL hookup or a broadband device that provides a local “hot spot” for voice/data access). This is needed for email/internet and will enable the user to take advantage of the AllPro app’s email features.

Note: above configuration does not include standard necessities such as telephones, fax machines or printers (all needed for a typical EN).

Deployment Configuration: Multi-Users / Single Business Office Location

This configuration is a bit more complex and requires more resources.

Potential Configuration:

- 2 or more Desktop PCs or Laptops (Windows 7 Operating System) with one of the PCs acting as a central network server to host the AllPro application
- 1 External Storage Device (for backup purposes)
- 2 or more MicroSoft Office Professional 2010 Licenses (includes MicroSoft Access)
- 1 AllPro for ENs software license (1 license agreement provides for unlimited copies within a single Employment Network)
- Access to a voice/data (i.e. internet) provider (either a link to a cable, DSL hookup or a mobile broadband device that provides a local “hot spot” for voice/data access). This is needed for email/internet and will enable the user to take advantage of the AllPro app’s email features.
- 1 Wireless (or Wired) network router.

Note: above configuration does not include standard necessities such as telephones, fax machines or printers (all needed for a typical EN).

Deployment Configuration: Multi-Users / Multi-Business Office Locations

This configuration is even more complex, requires more equipment and access to a MicroSoft SharePoint Services site. System performance can be impacted by SharePoint site space limitations and internet service / network speed.

Potential Configuration:

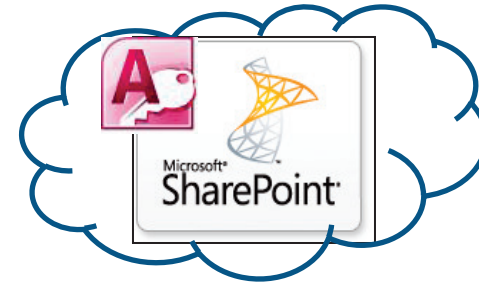
- 2 or more Desktop PCs or Laptops (Windows 7 Operating System) having development access to a SharePoint site
- 1 or more External Storage Devices (for backup purposes)
- 2 or more MicroSoft Office Professional 2010 Licenses (includes MicroSoft Access)
- 1 AllPro for ENs software license (1 license agreement provides for unlimited copies within a single Employment Network)
- Access to a voice/data (i.e. internet) provider (either a link to a cable, DSL hookup or a mobile broadband device that provides a local “hot spot” for voice/data access). This is needed for email/internet and will enable the user to take advantage of the AllPro app’s email features.
- 1 Wireless (or Wired) network router (possibly more for satellite locations)
- Access to a SharePoint site

Note: above configuration does not include standard necessities such as telephones, fax machines or printers (all needed for a typical EN).

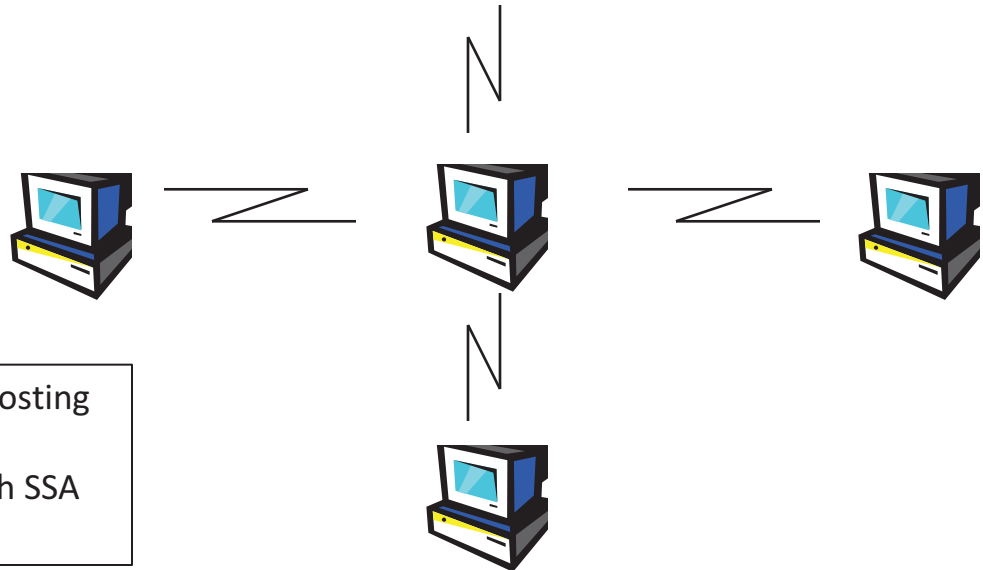
Example: Microsoft SharePoint – Access Configuration

Microsoft SharePoint provides methodology to host a Microsoft Access database application with data that can be shared via web technology.

Microsoft SharePoint has the capability to host the entire Access application or database table data (known as “lists”) or both. Once a SharePoint hosting service is selected with proper security, the hosting process can be initiated directly from the Microsoft Access application.



In this example, multi-users from disparate locations can all engage the SharePoint / Access application via a web portal.



NOTE: 1) system performance can be impacted by hosting site space limitations and internet service provider / network speed, and 2) hosted sites must comply with SSA security guidelines.

About A-Tek and AllPro:

A-Tek Services LLC is owned and managed by Al Walker, President and CEO. The company was established for the purpose of developing software applications for small businesses.

A-Tek developed and tested the AllPro for Employment Networks database application and received outstanding requirements direction and support from Pam Walker, President and CEO of Alliance Professional Services LLC, an Employment Network established in the state of Tennessee. Since implementation of AllPro, Alliance and a growing number of other AllPro users have provided valuable input to ensure the application meets rigorous program and security guidelines.

Al Walker, President and CEO of A-Tek Services LLC:

- Certified Public Accountant, State of Tennessee
- Master of Science, Accounting and Computer Information Systems, University of Memphis
- BBA, Accounting and Finance, University of Memphis
- Controller and Vice President for two Memphis, TN manufacturing companies
- Sales Analysis Manager, Coca Cola Enterprises, Inc., Mid-South Division
- Manager Information Technology, Federal Express Corporation and FedEx Services, Memphis, TN (12 years of global computer systems development for finance, sales, revenue systems)
- Over 30 years of management experience in accounting, finance, internal controls, project management, global information technology, database development, Electronic Data Interchange (EDI) development, web technologies, sales support and dashboard reporting technologies
- Extensive experience with human resource, INS, EEO, hiring practices and team-building programs

Questions?

Contact Al Walker, A-Tek Services LLC via Email – al@allpro-group.com